



# Using PRISM

18P

**FOR USE IN THE FIFTH ROUND  
2004 GRANT CYCLE**

MARCH 2004



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**Those who are already familiar with PRISM and have entered applications previously may want to go directly to XIII Quick Steps.**

## **I. What is PRISM**

PRISM is an automated tool for applicants to submit applications to the SRFB via the Internet. This tool can also be used to view other applications and to monitor funded projects.

PRISM has an extensive amount of security built into the system. While PRISM is accessible to anyone to review data, only individuals from applying organization can add, modify, or delete data for their application, and this is limited to certain periods of the application.

Do not worry about making mistakes. PRISM security will not allow you to do anything destructive or enter inappropriate data. Any mistakes in entering can be fixed at a later time.

Training will be provided to applicants and lead entities at the application workshops. If you have any problems entering data, first call your Grant Manager. If they are not available, go to the operator or call (360) 902-3000. Staff can help you enter an application over the telephone. They have the ability to view the same data you are viewing.

When you begin entering your application, we recommend (at least for your first application) you have much of the information prepared before you start entering your application. Blank application forms can be found on the SRFB Documents webpage <http://www.iac.wa.gov/srfb/docs.html>. However, if you don't have all the data, don't worry, you can finish entering it at a later time.

The minimum requirements for running PRISM on your computer are:

- Connection to an ISP
- If you are behind a firewall, TCP Port 1433 must be open for outbound traffic
- 28.8k Modem (56k is preferable)
- 35 MEG hard disk space
- 16 MEG of RAM (32 is preferable)
- Pentium Class Processor AND one of these operating systems: Windows 95, Windows 98, Windows NT, Windows 2000, Windows ME, or Windows XP

## II. PRISM Access


PRISM is a client-server application that is accessed via the Internet. To get started, a user must download the free client software and install it on their computer. If you will be entering an application, you will need to obtain a logon ID and password as well. Both the software and logon requests are available at the IAC website.

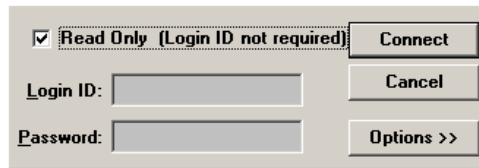
Download software: Go to <http://www.iac.wa.gov/oiaac/prism/reqs.htm> and follow the instructions for downloading the PRISM installation program (prisminst.exe). Once you have downloaded the program, double-click on it to begin the installation wizard. We recommend that you close all other programs on your machine before clicking the Next button on the first wizard screen. Once the setup is complete, you can accept the default to restart your computer or you can choose to restart your computer later. Click the Finish key. Once your computer restarts, the setup is complete.

If you experience any difficulties downloading or installing, contact Bob Euliss or Karen McDonald at (360) 902-3000 for help.

Logon Request: IAC website <http://www.iac.wa.gov/oiaac/prism/access.htm> has an on-line request for a logon and password. If you prefer, you can submit a paper request (See Appendix A). You need a logon if you are going to be entering data. Read-only access does not require a logon ID.


### III. Signing on to PRISM

To start PRISM, go to the Start Menu→Programs→PRISM and click on the  PRISM icon. For Read Only Access, a login ID is not required. Just click the Connect button with the Read Only checkbox checked as shown below:



A screenshot of the PRISM login dialog box. The 'Read Only (Login ID not required)' checkbox is checked. The 'Login ID' and 'Password' fields are empty. The 'Connect' button is highlighted. Other buttons include 'Cancel' and 'Options >>'.

If you will be entering an application, you will need to uncheck the checkbox and enter your assigned Login ID and Password. The Logon determines the level of security for a user and what screens and fields a user can access.

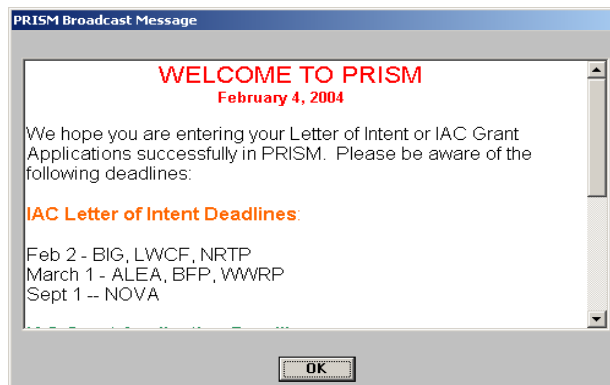


A screenshot of the PRISM login dialog box. The 'Read Only (Login ID not required)' checkbox is unchecked. The 'Login ID' and 'Password' fields are empty. The 'Connect' button is highlighted. Other buttons include 'Cancel' and 'Options >>'.

After the Login screen has been completed, click the Connect button to connect to PRISM.

If you experience any difficulties connecting to PRISM, contact Bob Euliss or Karen McDonald at (360) 902-3000 for help.

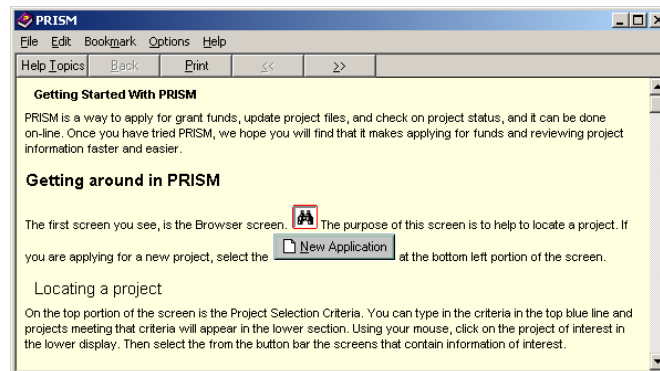
The PRISM Broadcast Message screen will display, welcoming you to the PRISM program. This screen is changed periodically to provide updated information to users.

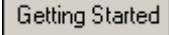


A screenshot of the PRISM Broadcast Message screen. The title bar says 'PRISM Broadcast Message'. The main text reads: 'WELCOME TO PRISM February 4, 2004'. Below this, it says: 'We hope you are entering your Letter of Intent or IAC Grant Applications successfully in PRISM. Please be aware of the following deadlines:'. Under the heading 'IAC Letter of Intent Deadlines:', the following deadlines are listed: 'Feb 2 - BIG, LWCF, N RTP', 'March 1 - ALEA, BFP, WWRP', and 'Sept 1 -- NOVA'. An 'OK' button is at the bottom.

Click OK to close the Broadcast Message Screen.


If you have opted for Read Only access or if this is the first time you are logging into PRISM, the Getting Started help file will be displayed.

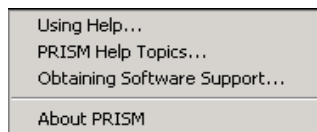


A user can access this help at anytime by selecting the  icon located at the bottom left side of the screen. This help is focused on assisting users to navigate the Browser and enter a new application.

## IV. PRISM Help

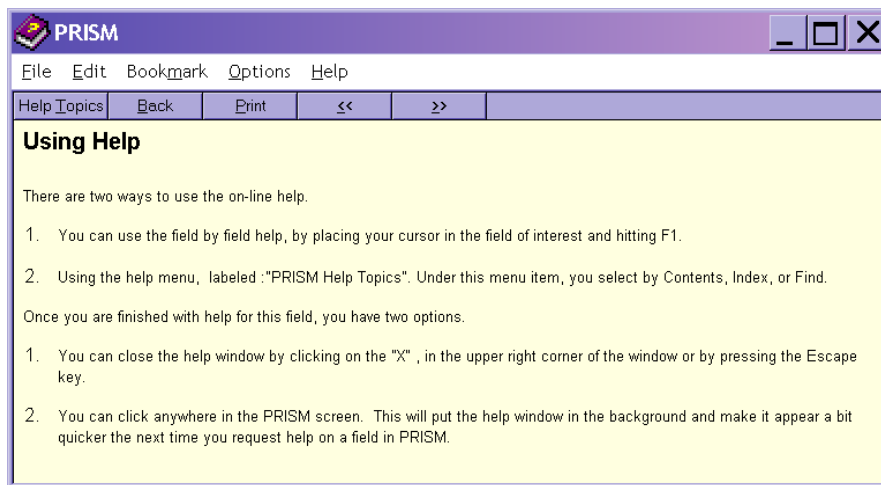
In addition to the Getting Started help that you can access from the Browser, there are three additional ways to access the help features:

- Field level Help. Field level help is available throughout the system. Click on a field, then select F1. This help will tell you about the field, how to complete the field, and the type of information is being requested.
- Obtaining Software Support. This help displays a telephone number to contact if the user is having difficulties using PRISM.
- Main Menu Help. This help is accessed by clicking the Help menu item . Selecting Help brings up the following options.



Using Help describes the two ways of using Help.

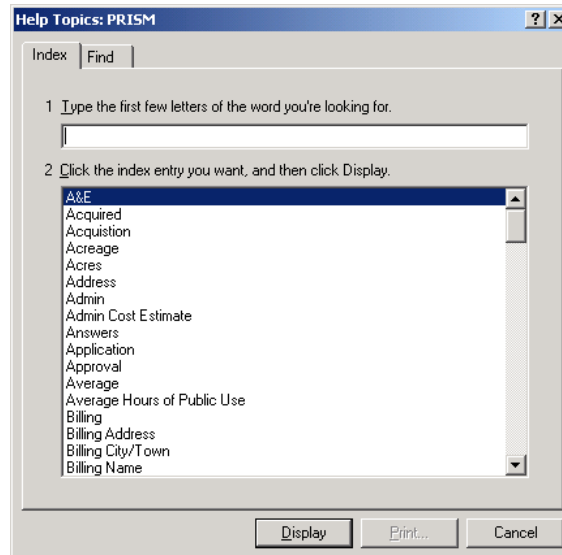
### Using Help





PRISM Help Topics brings up the option for Index or Find. The Index permits a user to type in a topic and then select the appropriate help item.

#### PRISM Help Topics - Index



The Find tab permits a user to search for a specific word or phrase.

#### PRISM Help Topics – Find



**REMEMBER – YOU ARE NOT ALONE IN ENTERING AN APPLICATION IN PRISM. YOUR GRANT MANAGER AND OTHER SRFB STAFF ARE AVAILABLE TO ASSIST YOU EVERY STEP OF THE WAY.**

## V. Locating a project

The first screen displayed after completing the login process is the *Project Browser*. This screen is used to list and locate specific projects based on selection criteria. The Browser shows basic information for each project: IAC project number, sponsor, project name, program funding source, assigned IAC/SRFB Grant Manager, and status. The Browser is designed to display project information. No data is entered on this screen.

Project Browser

The screenshot shows the 'PRISM - Project WorkBench - [Project Browser]' window. It features a menu bar (File, Reports, Window, Help) and a toolbar with various icons. Below the menu bar is the 'Project Selection Criteria' section, which includes dropdown menus for 'Managing Agency' (set to 'IAC') and 'Funding Board' (set to '<All>'). There are checkboxes for 'Automatic Re-query', 'Status Detail', and 'Include related organization projects', along with a 'Refresh' button. A table with columns 'Proj #', 'Type', 'Sponsor', 'Project', 'Program', 'Manager', and 'Status' is displayed. The 'Status' column has a dropdown menu set to 'Active'. Below this is the 'Projects Meeting Criteria' section, which includes a table with the same columns as the one above. The table lists various projects with their details. At the bottom of the window, there are buttons for 'Getting Started', 'New Application', and 'Print', along with a status bar showing 'Total Projects: 857 of 857' and a 'Close' button.

Proj #	Type	Sponsor	Project	Program	Manager	Status
00-1539	N	Fish & Wildlife Dept of	Riverfront Park Boat Launch Improve	BFP-STATE	MyraB	Active
00-1537	D	Klickitat Port of	Bingen Marina Development Project	BFP-LOCAL	KammB	Active
00-1534	M	USFS WNF Leavenworth/Lk. V.	Trail Maintenance-South	NRTP-GENER	ScotC	Active
00-1533	M	USFS WNF Leavenworth/Lk. V.	Trail Maintenance-North of Hwy 2	NRTP-GENER	ScotC	Active
00-1530	D	Natural Resources Dept of	Walker Valley Jeep Trail Extension	NOVA-ORV	ScotC	Active
00-1529	D	Richland City of	Horn Rapids ORV Project	NOVA-ORV	MargA	Active
00-1527	N	Thurston County Parks & Rec	ORV Sports Park Planning Project	NOVA-ORV	ScotC	Active
00-1526	C	Milton City of	Milton Interurban Trail	V/VRP-ORA-TR	MyraB	Active
00-1520	D	Colville City of	Colville Swimming Pool	V/VRP-ORA-LP	MyraB	Active
00-1519	D	Pasco Parks & Rec Dept	Pasco Softball Complex Lighting	V/VRP-ORA-LP	MargA	Active
00-1514	C	Nasavine City of	Nasavine City Park	V/VRP-ORA-LP	KammB	Active
00-1511	D	Hazel Dell Little League	H.B. Fuller Park Sports Complex	YAF-MAINT	KammB	Active
00-1510	D	Harmony Sports Association	Harmony Sports Complex Project #1	YAF-MAINT	KammB	Active
00-1509	D	Goldendale City of	E'Kone Park Field Renovation	YAF-MAINT	KammB	Active
00-1502	C	Allgn Port of	Waterfront Acquisition, Allgn	V/VRP-ORA-V/A	KammB	Active
00-1505	D	Bellingham Parks & Rec Dept	Railroad Trail/Alabama St. Overpass	V/VRP-ORA-TR	DarrJ	Active

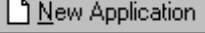
The Browser is used to find a specific project by entering data on the blue line. Data that can be provided is the SRFB project number, sponsor name, or project name. In addition, selecting information in the dropdown boxes under program, SRFB Grant Manager, or status will further define the list of projects. The more information provided on the blue line, the narrower the search and the fewer projects will be displayed on the bottom portion of the screen. To display your selection, select the Refresh button on the top right portion of the screen.

Once you have located the project you wish to review or edit, click on the data line. It will put a dark box around it. You can verify the correct project is selected by viewing the Status Line along the bottom of the screen. To review or edit application data, select the Application Data Icon located at the top of the screen. Then move through the tabs. For further instructions, see the next section on adding an application.

The Print button, located at the bottom right of the screen is used to print the data displayed on the screen. This report is called the Browser Report.

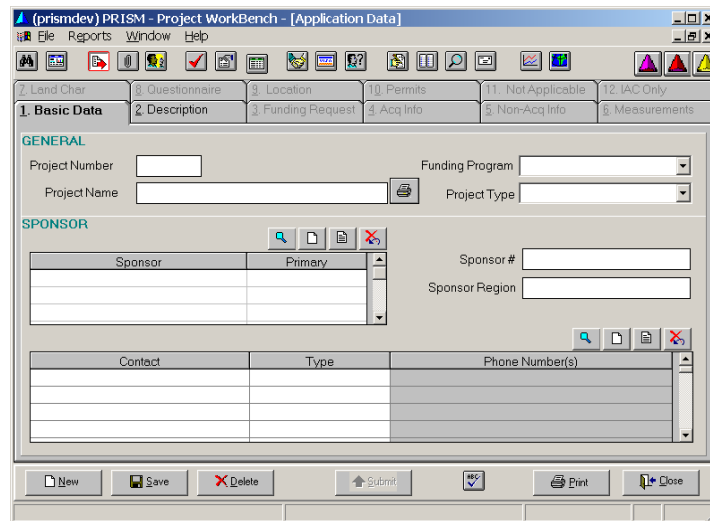
The Close button is used to close the Browser. To reactivate the Browser, select the Browser button .

## VI. Starting an Application

Select the New Application button  located on the left bottom portion of the browser screen. This is used to add a new application that has not been entered into PRISM before. If you started a project and wish to update it, refer to the previous section on how to locate a project.

An applicant can input some data in PRISM, then save. Later they can return to the application and enter additional information. Application data does not have to be entered all in one session. While an applicant can only enter one application at a time, multiple applications can be at various stages of entry at one time.

Tab 1 Basic Data is the first screen that will appear. You will notice that only Tabs 1 and 2 are activated. They must be completed and SAVED before a project number is assigned and any other screens are available for data entry.



Project Number: A project number is assigned by PRISM once the screen has been saved.


Project Name: Type in a project name. Try to use a unique name that is descriptive of the project.

Funding Program. The funding program is selected from a dropdown box. The dropdown box will display a list of programs currently accepting applications for the IAC and SRFB. Select Salmon State Projects.


Project Types. The project Type is selected from a dropdown box eligible for SRFB salmon projects. The user will have an option of:

- Acquisition (A)
- Combined (Acquisition and Restoration) (C)
- Non-Capital (Assessments and Studies) (N)
- Planning/Acquisition (Acquisition and Planning) (P)
- Restoration (R)

**Sponsor # and Sponsor Region:** These optional text fields are for an applicant to use to identify their internal number and region. This allows an applicant to cross-reference a SRFB project with their own number.

**Sponsor.** Select the Find button  located to the right of the Sponsor block to bring up the Organization Search selection box. The user must select either an organization or a person (private landowner) for the project. The screen defaults to the Organization and, in almost all cases, is the appropriate selection.

Organization Search Pop-up



**Organization/Person Search**

**NOTE**  
To initiate a search, select Organization or Person Search. Begin entering the organization name or person's last name in the field below. Once the desired name appears in the list, select it by clicking on it or press the CLOSE button to Cancel.

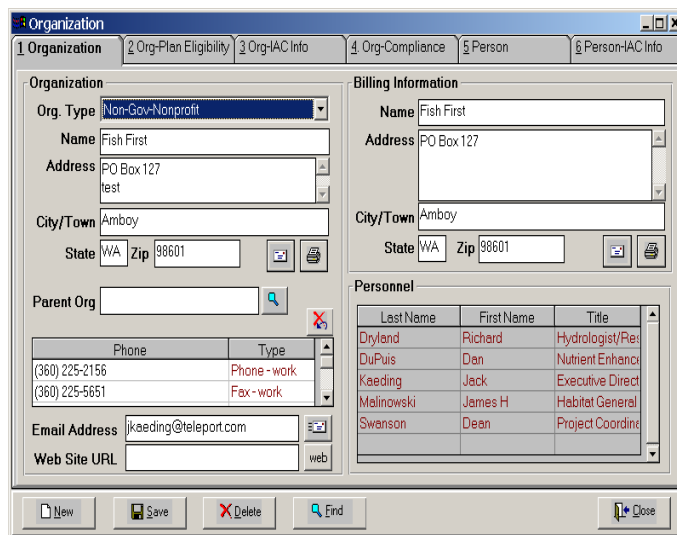
☒ Organization Search ☐ Person Search

fish

- Fish & Wildlife Dept of
- Fish First
- Fisher Properties Inc
- Fisheries Renewal BC
- Fishermans Cove Resort
- Fishtrap Lake Resort

Close

Organization/Person, Tab 1



**Organization**

1 Organization 2 Org-Plan Eligibility 3 Org-IAC Info 4 Org-Compliance 5 Person 6 Person-IAC Info

**Organization**

Org. Type: Non-Gov-Nonprofit

Name: Fish First

Address: PO Box 127

City/Town: Amboy

State: WA Zip: 98601

Parent Org:

Phone: (360) 225-2156 Type: Phone - work

Phone: (360) 225-5651 Type: Fax - work

Email Address: jkeading@teleport.com

Web Site URL:

**Billing Information**

Name: Fish First

Address: PO Box 127

City/Town: Amboy

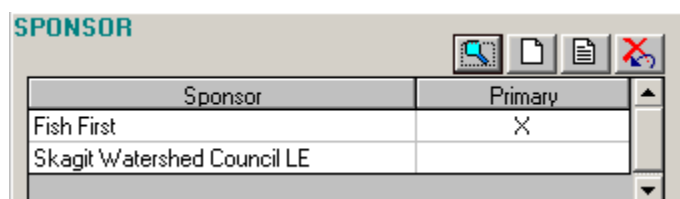
State: WA Zip: 98601

**Personnel**

Last Name	First Name	Title
Dryland	Richard	Hydrologist/Re:
DuPuis	Dan	Nutrient Enhanc:
Keading	Jack	Executive Direct
Malinowski	James H	Habitat General
Swanson	Dean	Project Coordin

New Save Delete Find Close

To use the search box, start typing the organization or person name and after two characters, a list will display. Click on the organization or person name, and the record will be retrieved and posted to the Application Data, Tab 1 Basic Data screen.






**SPONSOR**


Sponsor	Primary
Fish First	X
Skagit Watershed Council LE	

The applicant (sponsor) should be designated as "Primary." The lead entity for the project should be selected, but not as the Primary, unless the lead entity is the applicant. The "Primary" designation can be changed by clicking in the "Primary" box. The "X" will move to the box clicked in.

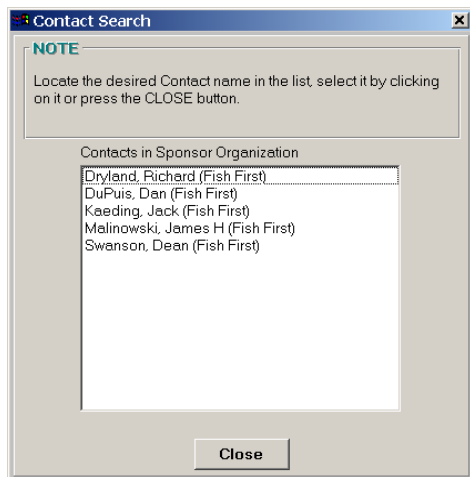
Any organization listed in the Sponsor box has the ability to change and modify the data when the project is in pre-application and application submitted status. Once the project is moved to application complete, only SRFB staff have the ability to change data.

The user can verify the organization data is accurate by double clicking on the organization name or selecting the Edit  button.

The user may correct any information that is incorrect. When the edits are complete the user must click on the Save  and  buttons located at the bottom of the screen. This will return the user to the basic application screen.

Contact. Select the Find button  located to the right of the Contact block to bring up the Contact Person Search.

Contact Search



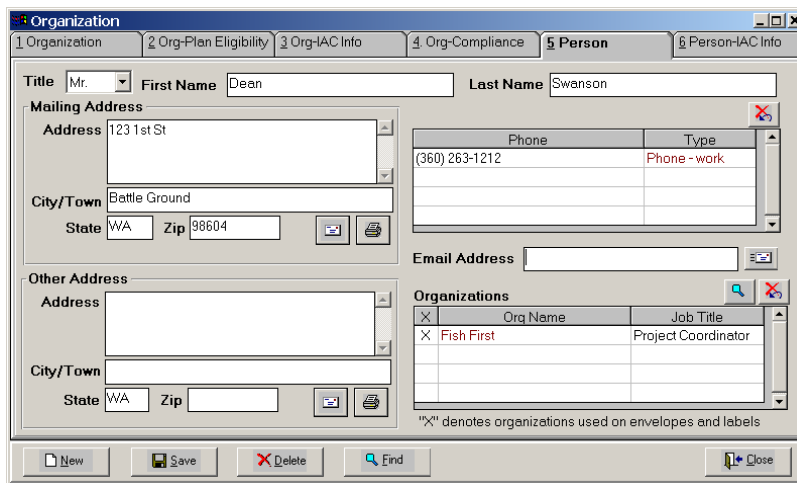
**NOTE**  
Locate the desired Contact name in the list, select it by clicking on it or press the CLOSE button.

Contacts in Sponsor Organization

- Dryland, Richard (Fish First)
- DuPuis, Dan (Fish First)
- Kaeding, Jack (Fish First)
- Malinowski, James H (Fish First)
- Swanson, Dean (Fish First)

Close

Organization/Person Tab 5, Person



**Organization**

1 Organization 2 Org-Plan Eligibility 3 Org-IAC Info 4 Org-Compliance 5 **Person** 6 Person-IAC Info

Title  First Name  Last Name

**Mailing Address**

Address

City/Town  State  Zip

**Other Address**

Address

City/Town  State  Zip

Phone  Type




Email Address


**Organizations**

X	Org Name	Job Title
X	Fish First	Project Coordinator

"X" denotes organizations used on envelopes and labels


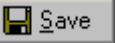

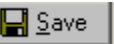
New Save Delete Find Close

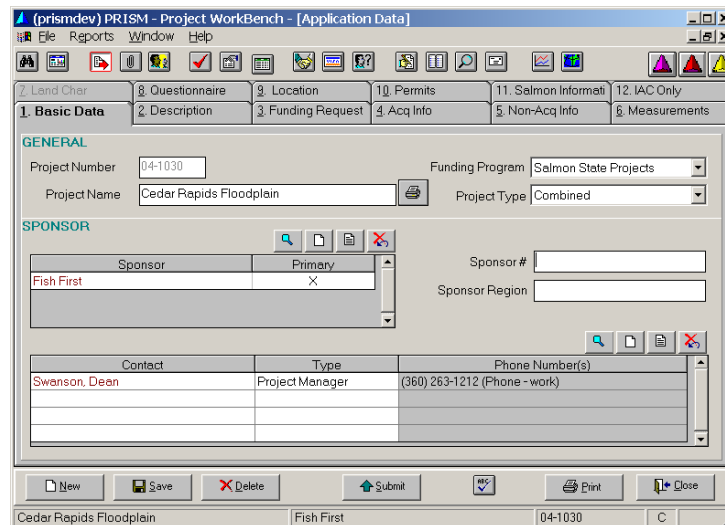
If the contact exists, click on the name, and the record will be retrieved and posted to the Application Data screen. The Person record can be edited by double clicking on the Contact name or selecting the Edit  button. When the edits are complete, the user must click on the Save  and Close  buttons located at the bottom of the screen. This will return the user to the basic application screen.

If the search yields no matches, then select the Add  button. A blank person screen will be available for data entry. **If you have a logon and you are selecting yourself, you are in the system. Do not add yourself** – use the find process.

Contact	Type
Malinowski, James H	Engineer/Architect
Solomon, Shirley	Lead Entity Contact
Swanson, Dean	Project Manager

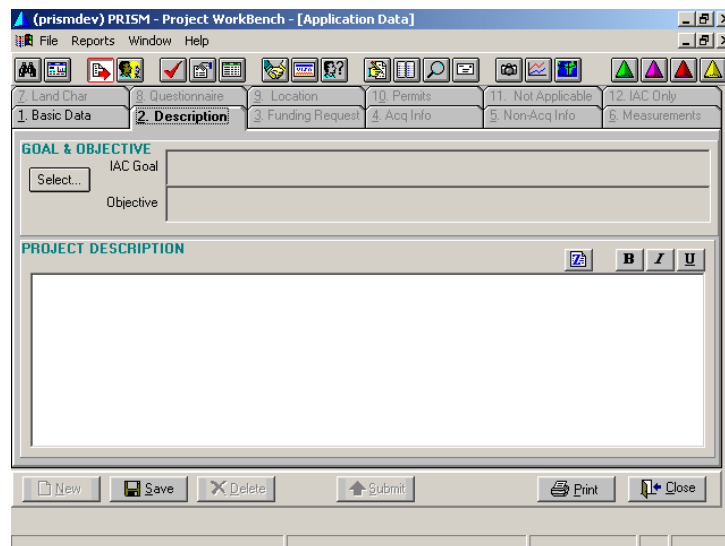
Select the appropriate contact type in the dropdown box for each contact. Each application must have one, and only one, Project Manager. The Project Manager is the individual SRFB staff will be contacting for information about the project and will be the recipient of the majority of correspondence.

To delete text, select the row to be deleted and click on the  button. Text to be deleted will change to italics and will be deleted after the  Save button is pressed. If you change your mind and want to keep the text, simply click on the  button again before pressing  Save.



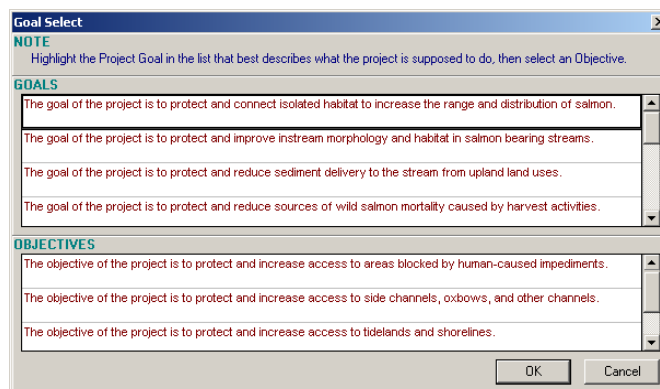
The screenshot shows the PRISM - Project WorkBench - [Application Data] window. The 'Basic Data' tab is selected. The 'GENERAL' section contains fields for Project Number (04-1030), Project Name (Cedar Rapids Floodplain), Funding Program (Salmon State Projects), and Project Type (Combined). The 'SPONSOR' section has a table with one row: 'Fish First' as the Sponsor and 'X' as the Primary. Below this is a table for contact information with one row: 'Swanson, Dean' as the Contact, 'Project Manager' as the Type, and '(360) 263-1212 (Phone - work)' as the Phone Number(s). The bottom of the window shows a status bar with 'Cedar Rapids Floodplain', 'Fish First', '04-1030', and 'C'.

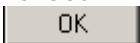
Once the first tab has been completed, click on Tab 2, Description. Do not save until the Description tab has been completed.








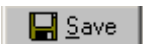
The screenshot shows the PRISM - Project WorkBench - [Application Data] window with the 'Description' tab selected. The 'GOAL & OBJECTIVE' section has a 'Select...' button for the IAC Goal and a text field for the Objective. The 'PROJECT DESCRIPTION' section has a large text area for the description. The bottom of the window shows a status bar with 'Cedar Rapids Floodplain', 'Fish First', '04-1030', and 'C'.

Goal and Objective. Click on the  button to bring up a list of Goals and Objectives.

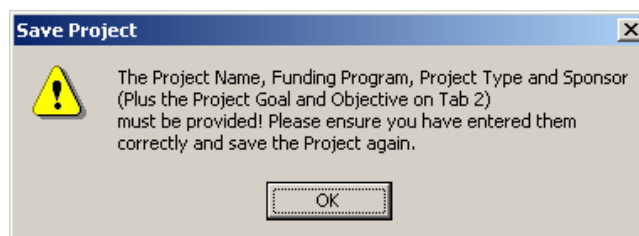


Clicking on a Goal will bring up one or more possible Objectives. Select an Objective and then select the  button. This will return the user to the Description Tab.

Type in a Project Description (or paste from another file). The field allows up to 1500 characters. The description field can be formatted using the Bold , Italic , or Underline  buttons. Additionally, the description field can be made larger by selecting the Zoom  button. To verify the Description field spelling, select the Spell Check button .

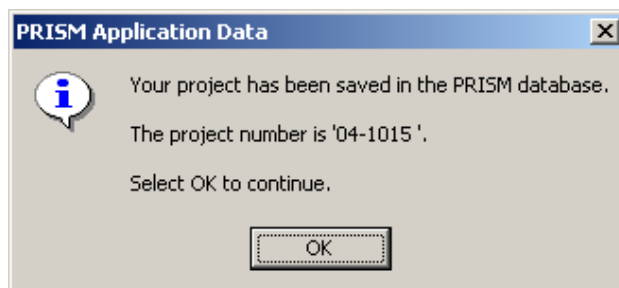
Select the  button at the bottom of the Descriptions Screen. This will save the project and assign a number.


If any data is missing the following message will display:



Complete the required fields, then select save again.

If all the data is complete, the following message will display:



For ease of finding your project in the future, write down the project number. Select the  button and it will activate additional screens for further data entry.

Based on the type of project the user selected, different tabs will be activated. If the tab is activated, you are required to complete some information on that tab.



## VII. Adding Financial Information

Tab 3 Funding Request. The third tab will now be open for inputting data.

### Application Data, Tab 3 Funding Request

Funding Source	Amount	%
Salmon State Projects	\$0.00	0%

Category	Amount

Sponsor Total: \$0.00 0%  
Project Total: \$0.00 100%


Acquisition Estimate: \$0.00  
Development/Restoration Estimate: \$0.00  
Total Project Estimate: \$0.00

The IAC Funding Request located at the top of the screen needs to have the amount of funds you are requesting from the SRFB for this application. Type the amount in the amount field.

IAC Funding Request	
Funding Source	Amount
Salmon State Projects	\$100,000.00

Under the Sponsor Match section, select from the dropdown box the type of match amounts your organization will be providing and type in the amount for each type of match.

Sponsor Match	
Category	Amount
Appropriation \ Cash	\$20,000.00
Donated Labor	\$10,000.00
Grant - Federal	\$30,000.00

The Project Cost Estimate section on the right side of the screen is to reconcile amount needed for this application and the amount entered into the cost estimate Tabs 4 and 5. Once the cost estimates (Tabs 4 and 5) have been entered and saved, data will display on this screen. The amounts shown must equal the amount requested. Since Tabs 4 and 5 have not yet been completed, this section shows the Acquisition Estimate and Development/Restoration Estimates as \$0. Select  Save and go to next Tab.

Tab 4 Acquisition Info is available for all applications with acquisition elements (project types = Acquisition, Combined, and Acquisition/Planning). The first screen is primarily a summary of individual property information keyed into the Acquisition Property Detail Pop-up screen. Individual properties entered in the Pop-up screen are displayed on the Acquisition Information screen in a list format on the left portion of the screen along with acquisition cost items and estimated amounts displayed on the right portion of the screen.


The only data field entered on this tab is the Administrative Cost field, located on the bottom right portion of the screen. Administrative Cost should be entered on this screen for all properties being purchased. Property costs will be captured on the pop-up property screen. PRISM calculates the maximum Administrative Costs that are eligible and displays it at the bottom left of the screen. At this stage, the maximum amount is \$0, but after property information has been entered, it will be updated.

Application Data, Tab 4 Acquisition Info

Property Name	Acres	\$
Cedar Rapids	5	\$380,000.00
Property Totals: 5.00 \$380,000.00		

Acquisition Cost Item	Est. Amt
Applicable taxes	\$100.00
Appraisal and review	\$8,800.00
Closing	\$7,000.00
Demolition	\$3,000.00
Hazardous substances assess	\$2,000.00
Land	\$300,000.00
Other	\$100.00
Recording fees	\$2,500.00
Relocation	\$50,000.00
Survey	\$2,000.00
Title reports/insurance	\$3,000.00
Wetland delineation	\$1,500.00
Subtotal	\$380,000.00

Admin Amount Max: \$19,000.00    Admin % Max: 5%    Admin Cost Estimate: \$19,000.00  
Total Acq Cost Estimate: \$399,000.00

Application Property Details Pop-up Screen is for entering detailed information regarding each property to be purchased. Entry in the Pop-up occurs by selecting the Add  button in the Property List section. Type in the property name, anticipated date the land is to be acquired, and expected number of acres in the appropriate fields. The Value Determination and Purchase Type fields are selected from a dropdown boxes. The Acquisition Cost Items are selected from a dropdown box and the amount estimated for each item must be entered.


Application Data, Tab 4 Property Details

Property Name	Date to be Acquired	Acreage
Cedar Rapids	10/15/2003	5.00

Acquisition Cost Item	Est. Amt
Applicable taxes	\$100.00
Appraisal and review	\$8,800.00
Closing	\$7,000.00
Demolition	\$3,000.00
Hazardous substances assess	\$2,000.00
Land	\$300,000.00
Other	\$100.00
Recording fees	\$2,500.00
Relocation	\$50,000.00
Survey	\$2,000.00
Title reports/insurance	\$3,000.00
Wetland delineation	\$1,500.00
Subtotal	\$380,000.00

Admin Amount Max: \$19,000.00    Admin % Max: 5%    Admin Cost Estimate: \$19,000.00  
Total Acq Cost Estimate: \$399,000.00

Select SAVE. It will take you back to the Acquisition Information screen.

Users may enter multiple parcels. Also can edit previously entered projects by selecting the property line to be edited, then selecting the Edit button .

Don't forget to enter the Administration Costs eligible for this application on the Acquisition Information screen. The system will have calculated for you the maximum amount of administrative costs you can request, located on the bottom portion of the screen.

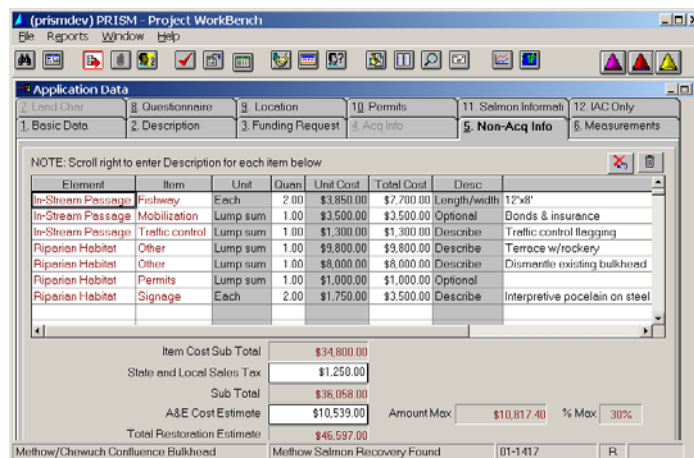
Admin Amount Max	\$2,250.00	Admin % Max	5%	Admin Cost Estimate	\$0.00
------------------	------------	-------------	----	---------------------	--------

Be sure to not exceed the Administrative Maximum Amount.

Select  Save and go to next Tab.

Tab 5 Non-Acquisition Info is available for all applications with restoration and planning elements (Project Type = Restoration and Combined); non-capital (assessments and studies), and Planning/Acquisition (planning and acquisition).

#### Application Data, Tab 5 Non-Acquisition Info



Element	Item	Unit	Quan	Unit Cost	Total Cost	Desc
In-Stream Passage	Freightway	Each	2.00	\$3,850.00	\$7,700.00	Length/width 12"x8"
In-Stream Passage	Mobilization	Lump sum	1.00	\$3,500.00	\$3,500.00	Optional Bonds & insurance
In-Stream Passage	Traffic control	Lump sum	1.00	\$1,300.00	\$1,300.00	Describe Traffic control flagging
Riparian Habitat	Other	Lump sum	1.00	\$9,800.00	\$9,800.00	Describe Terrace w/rockery
Riparian Habitat	Other	Lump sum	1.00	\$8,000.00	\$8,000.00	Describe Dismantle existing bulkhead
Riparian Habitat	Permits	Lump sum	1.00	\$1,000.00	\$1,000.00	Optional
Riparian Habitat	Signage	Each	2.00	\$1,750.00	\$3,500.00	Describe Interpretive pocelain on steel

Item Cost Sub Total	\$34,800.00
State and Local Sales Tax	\$1,250.00
Sub Total	\$36,050.00
A&E Cost Estimate	\$10,539.00
Total Restoration Estimate	\$46,589.00

Amount Max \$10,817.40 % Max 30%

Methow/Chewuch Confluence Bulkhead Methow Salmon Recovery Found 01-1417 R

Data entry occurs by selecting a grid box under the Element heading and clicking on the dropdown box. After selecting an Element, users must also select a corresponding Item from a dropdown list. To complete a particular cost element, the quantity and total cost must be manually entered. The unit is predefined.

For some items, a short description is required in the description field located to the far right of the screen. Depending on the user's column display, the far right column may not be displayed and, therefore, must be tabbed or scrolled. When leaving a line, which requires a description, a warning message will display if a required description was not entered.

If a large quantity or dollar amount will not fit within the column size, the column widths on this screen can be adjusted. Using the mouse, click on the column header and pull to desired width.

The State and Local Sales Tax and A&E Cost Estimate are entered on the bottom portion of the screen, if the field is not grayed out. The A&E Costs represent costs for the whole project, while the other costs are captured at the element and item level. PRISM calculates the maximum

To verify the Description field spelling, select the Spell Check button . Select  Save.

Application Data, Tab 3 Funding Request

Page 17

## VIII. Adding Project Specific Data

Tab 6 Measurements allows users to enter measurement data for their project. Applicants respond to each question by entering the numerical data under Proposed Qty. By clicking on the **Methods** button, further explanation for each question will be given. In the Notes section of the screen, a text box is available for respondents to give more information and is accessed by clicking on the appropriate box in the Proposed Qty data field. The Up/Down Arrow keys are used to move from question to question.

Application Data, Tab 6 Measurements

Measurement	Unit	Proposed Qty
Length of stream bank protected through land acquisition/easement/lease?	Miles	2.00
Length of stream made accessible by the removal of barriers other than culverts?	Miles	1.00
Length of stream made accessible for passage of salmon species by the improvement	Miles	0.00
Number of fish passage blockages removed or improved?	Number	3
Percent rearing habitat opened up?	Percent	75.00
Percent spawning habitat opened up?	Percent	50.00

Notes: (for the quantity selected above)  
Both sides of stream to be acquired

NOAA Fisheries Goal  
Salmon Habitat Protection and Restoration

Select  **Save** and go to next Tab.

Tab 8 Questionnaire allows users to respond to a series of questions. Applicants respond by reading the highlighted questions located on the top portion of the screen and responding in the text box located on the bottom portion of the screen. The Page Down/Up keys are used to move from question to question.

Application Data, Tab 8 Questionnaire

Question, Respond Below

1 of 20: For any grants listed in Section 5 - Summary of Funding Request, are there any restrictions on the use of these grant funds? When and how long will the grant funds be available to this project?

2 of 20: Describe the type of donated labor (skilled and unskilled), donated equipment, and donated materials that will be used for this project, identified in Section 5 - Summary of Funding Request.


3 of 20: What type of landowner currently owns the property? (Federal, Local, Private, State or Tribal)


4 of 20: What is the current land use of the site, and its history? Describe past human uses and salmon habitat functions.

Use Page-Up and Page-Down keys to move through the

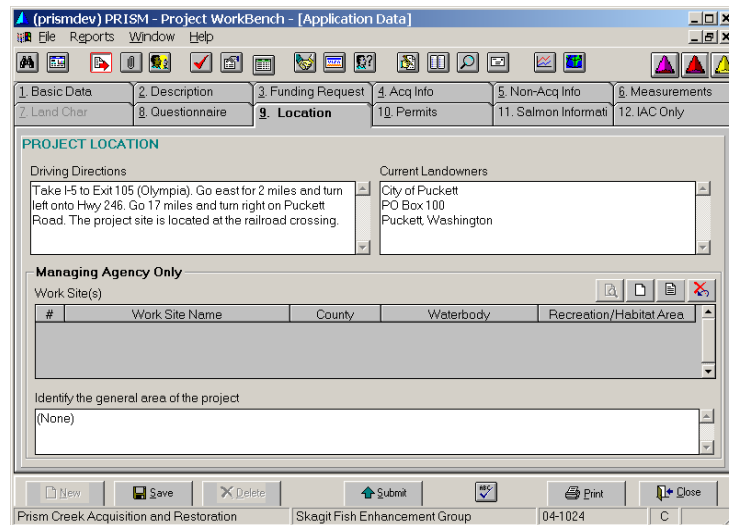
Respond below when appropriate

No Funds will be available 1/1/05 for three years.

To verify the Responses field spelling, select the Spell Check button . Select  **Save** and go to next Tab.

Tab 9 Location captures geographic and political boundary information about the project worksite(s). Applicants need to type in the driving directions and current landowner information. To verify the Driving Directions field spelling, select the Spell Check button . SRFB staff will enter the remainder of the field.

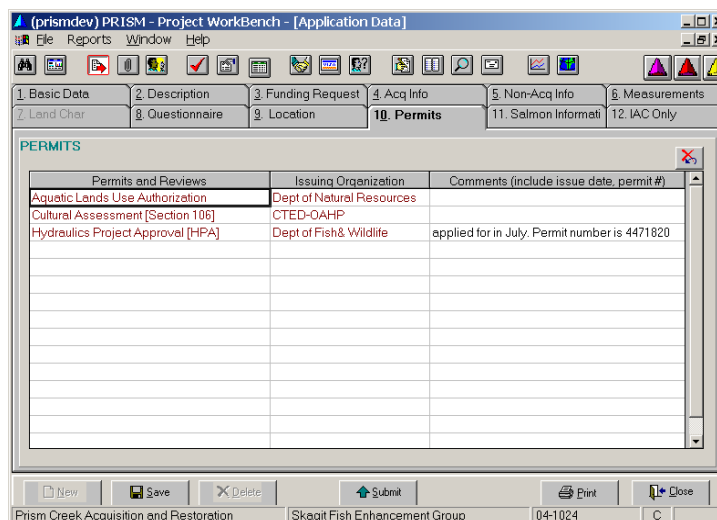
### Application Data, Tab 9 Location



Select  and go to next Tab.

Tab 10 Permits. Select from the dropdown box the permits needed for your project. The issuing organization data will appear when the permit type is selected. Add pertinent permit information in the text box.

### Application Data, Tab 10 Permits




Select  and go to next Tab.



Tab 11 Salmon Information. Select the Salmonid Species Targeted and Habitat Factors Addressed from the dropdown boxes and identify the Primary for each. The Species and Habitat Factors Source has three text fields to report the Study Name, Author, and Publish Date for the information used to identify targeted species and habitat factors addressed.

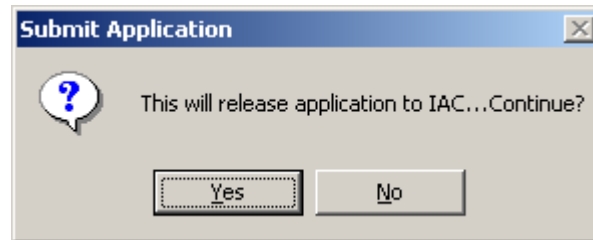
### Application Data, Tab 11 Salmon Information

The screenshot shows the 'PRISM - Project WorkBench - [Application Data]' application window. The '11. Salmon Info' tab is active. In the 'Species Targeted by Project' section, 'Chinook' is selected as the 'Salmonid Species Targeted' and is marked as 'Primary'. The 'Habitat Factors' section shows 'Estuarine and Nearshore Habitat' as the 'Habitat Factors Addressed' and is also marked as 'Primary'. The 'Source Identifying Species Targeted and Habitat Factors for Worksites' table has one entry: 'Nearshore recovery.' in the 'Study Name' column, 'D. Wilhelm' in the 'Author' column, and '10/10/2002' in the 'Date' column. The bottom status bar displays 'Test Project', 'State Parks', '04-1015', and 'C'.

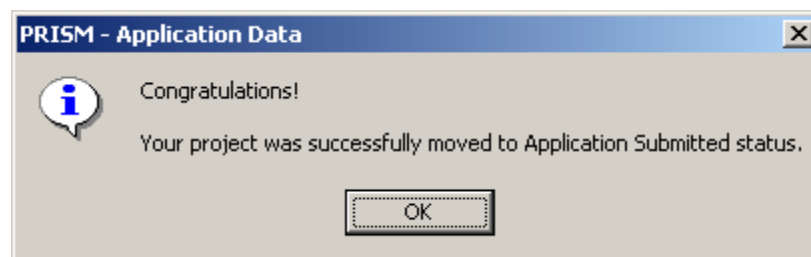
The Federal Status of Target Species information will be filled in at a later date, once a SRFB staff person enters the geographic information about your project. Select  **Save**.

## IX. Submitting your project

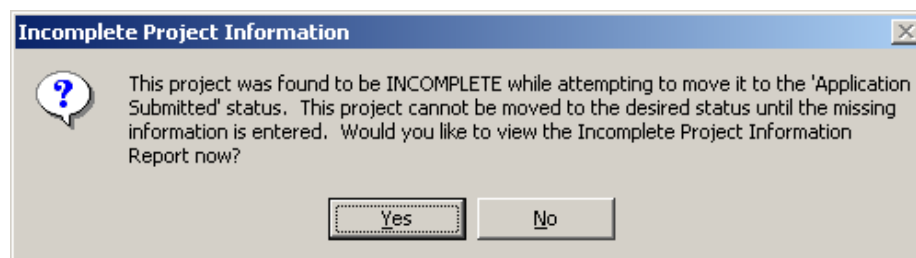
You have now completed all the fields required for your application. Select the  Save button. Next, select the  Submit button. It will bring up the following box. Select Yes.



This will activate an edit check to ensure all fields are complete. If the data is complete, you will receive the following message:



If any errors are detected it will bring up the following box. Select Yes.





The following report will display information about what screens and fields you need to provide additional information or corrections.

The screenshot shows a window titled '1Incpj' with a standard toolbar. The main content area is titled 'Incomplete Project Information Report'. It displays the following information:

Project Name:	test
Project Number:	04-1017
Project Type:	Restoration

---




**Incomplete Item #1**

Item:	Application Data
Screen:	Tab 5: Non-Acq Info
Field Name:	Element Item
Identifying Data:	
Correction Needed:	Need to identify at least one element item from the non-acquisition list for your project.

---

**Incomplete Item #2**

Item:	Application Data
Screen:	Tab 3: Funding Request


Fix the items listed, then  Save and  Submit the project again. Continue doing this process until your application passes all edits. Once application has moved to submitted status, select the  Close button. This will return you to the Browser screen.

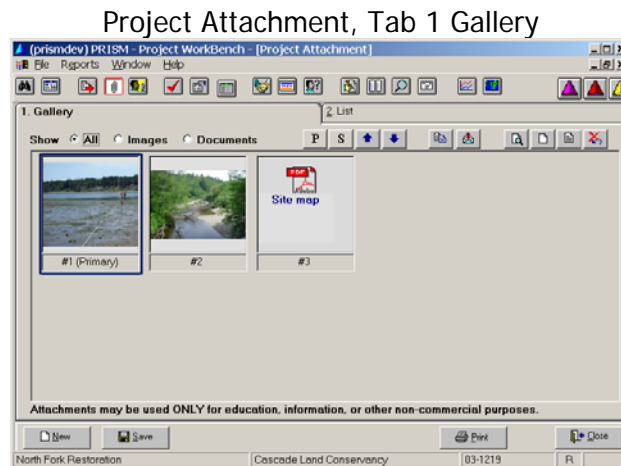
## X. Adding Attachments


Some materials and information on projects cannot be entered directly into PRISM. To help applicants submit more data electronically, PRISM has an Attachments Module to permit users to electronically submit information to the SRFB. Your connection speed must be close to 56k. Do not try this with a 28.8k connection speed. It will not work.

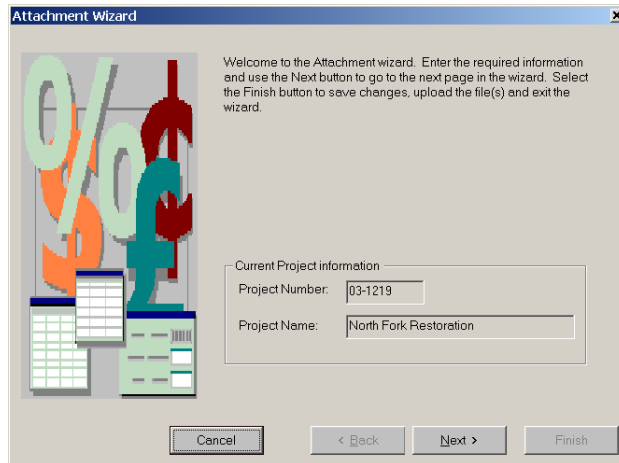
Typical types of attachments include the Application Authorization, Evaluation Proposal, Maps (general vicinity and worksite), Project Photos, Long-term Stewardship Plan, Project Partnership Contribution Forms, Landowner Willingness Form, and any other materials you feel are pertinent for SRFB staff and Technical Panel members for your application. This information will be provided to the technical panel in an electronic format.

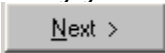
Documents that are not in a JPEG (photo) or PowerPoint format will be converted to a PDF file (such as word processing or spreadsheet files). These documents will be stored in PRISM and accessible by the applicant at all times. SRFB Grant Managers may at times also add documents to an application. If you have any problems attaching the document, e-mail the file to your SRFB Grant Manager. They will attach it for you. If you have a very slow Internet connection, you may find this process faster.

The first step to add an attachment is to locate the project on the Browser. Then click on the project and select the Attach  icon from the top menu.

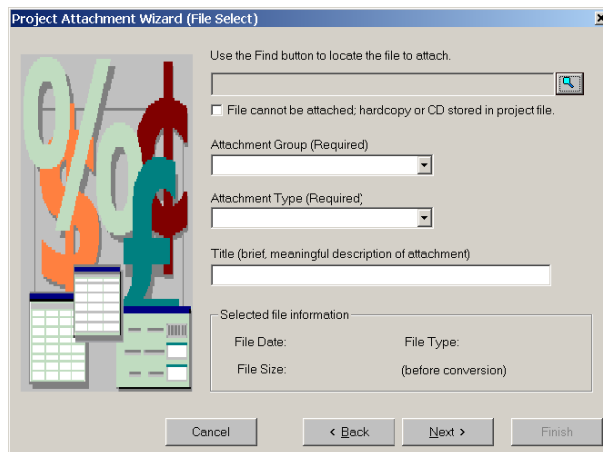



When you first enter this screen, there are no documents to view. To attach a new document, select the New  button. This will bring up the first screen of the Attachment Wizard.

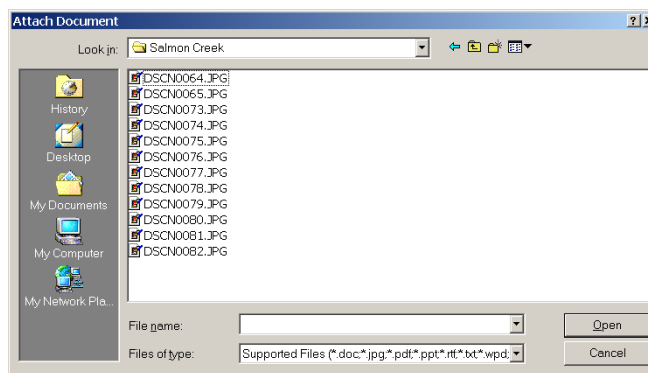


Verify you have the correct project number and project name, and then select the Next  button.

The second Attachment Wizard screen will allow you to select the document or photo to be attached and start collecting metadata to determine what fields need to be completed.

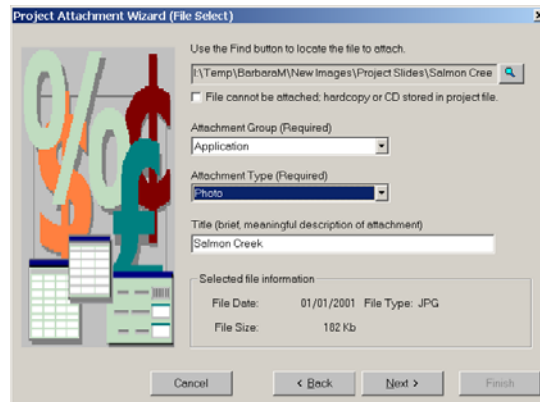


Use the Find  button as you would any search process. Clicking on the Find button will bring up a directory to search for the document or photo you plan to attach.

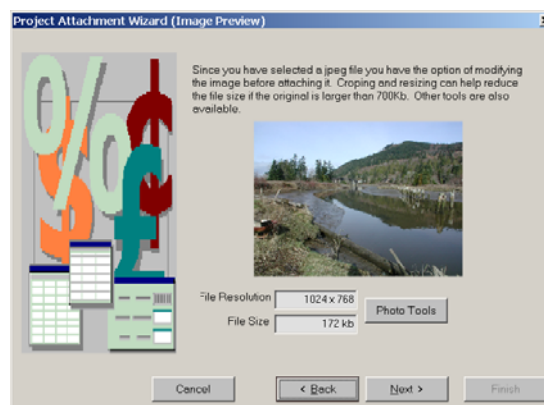


After selecting the item you wish to attach, you will be returned to the Attachment Wizard screen. The file name will appear in the first text box.

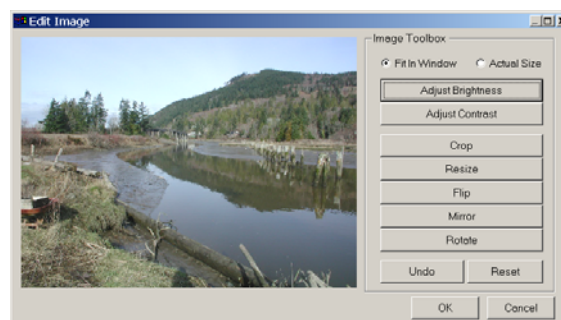
The Attachment Group and Attachment Type fields each contain a dropdown list from which to select an answer. Both of these fields are required. A title will appear in the next data field, which you may change if you wish. Information about the file is displayed on the bottom portion of the screen. Depending on the type of file selected, different screens will display.


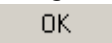




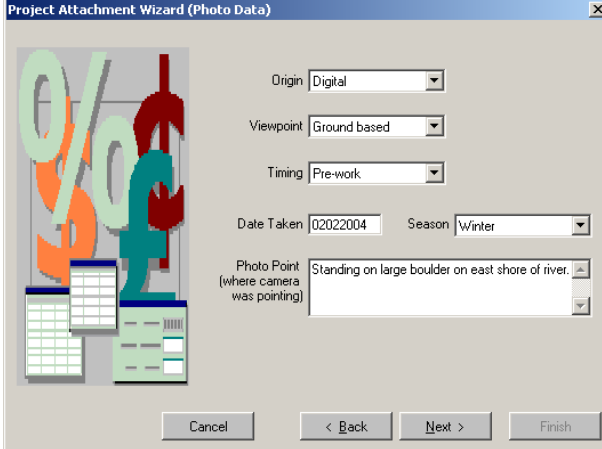
Select the Next  button. For JPEG files, it will bring up the Image Preview screen.



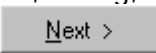
If you would like to modify the JPEG file, select the Photo Tools button. This will bring up the edit image screen.

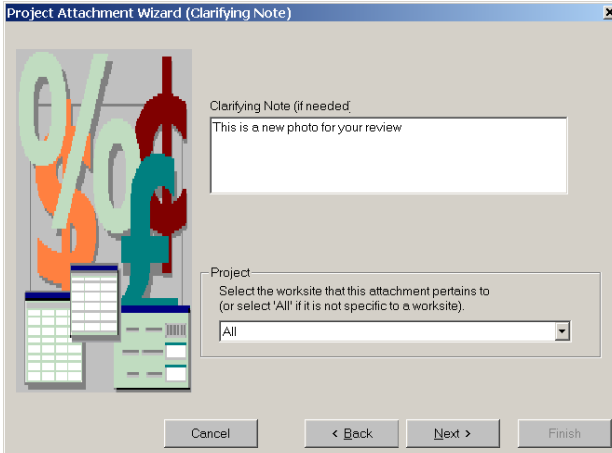


On this screen, you can make a number of changes to the photo. If you don't like the changes, select the Reset  button. Once you are done with the photo, select the OK  button. If it was the wrong photo select the Cancel  button. This will return you to the Project Attachment Wizard screen. Select the Next  button. This will bring up the Photo Data screen.



The dialog box is titled "Project Attachment Wizard (Photo Data)". On the left is a graphic with large, colorful numbers and symbols like a percent sign, dollar sign, and a bar chart. On the right, there are several input fields: "Origin" with a dropdown menu showing "Digital"; "Viewpoint" with a dropdown menu showing "Ground based"; "Timing" with a dropdown menu showing "Pre-work"; "Date Taken" with a text box containing "02022004" and "Season" with a dropdown menu showing "Winter"; and "Photo Point (where camera was pointing)" with a text box containing "Standing on large boulder on east shore of river." At the bottom are four buttons: "Cancel", "< Back", "Next >", and "Finish".

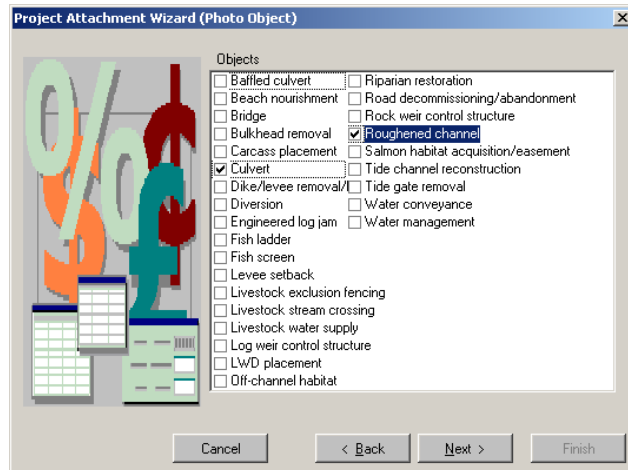
Select from the dropdown box the origin of the photo, viewpoint, timing, and season. Type in the date taken and photo point, if applicable. Select the Next  button. This will bring up the Clarifying Note screen.



The dialog box is titled "Project Attachment Wizard (Clarifying Note)". On the left is the same graphic as the previous screen. On the right, there are two sections: "Clarifying Note (if needed)" with a large text box containing "This is a new photo for your review"; and "Project" with a text box containing "Select the worksite that this attachment pertains to (or select 'All' if it is not specific to a worksite)." and a dropdown menu showing "All". At the bottom are four buttons: "Cancel", "< Back", "Next >", and "Finish".

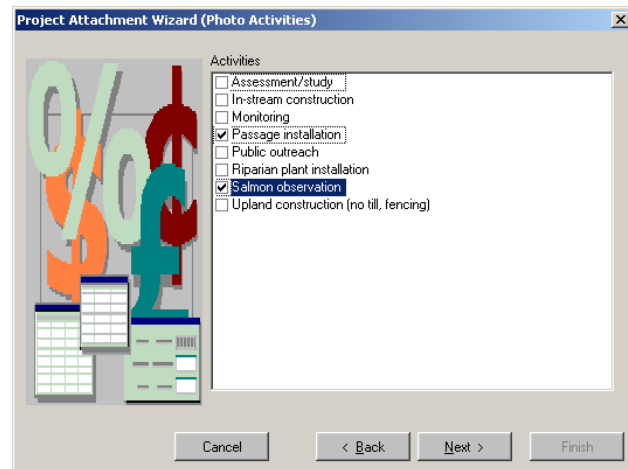
If you need to describe the information being provided, enter it in the Clarifying Note section. Select the Project Worksite from the dropdown box to attach an item to a specific worksite. If you are just starting an application, there will not be a worksite to select. After a SRFB staff member enters location information for this project, the worksite will appear in this section.

Select the Next  button. This will bring up the Photo Object screen.



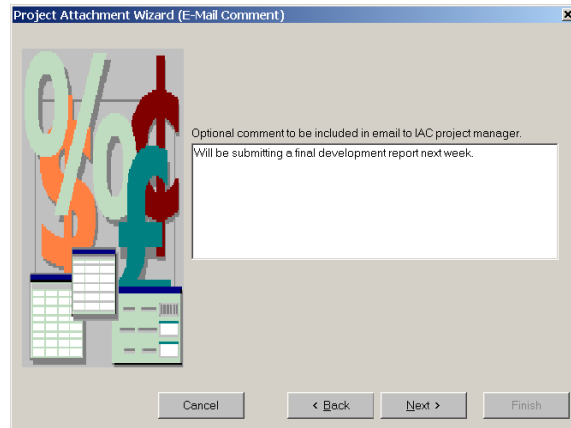
Click on all the Objects that are applicable to the attached photo. Select the Next button. This will bring up the Photo Activities screen.

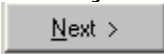
Next >

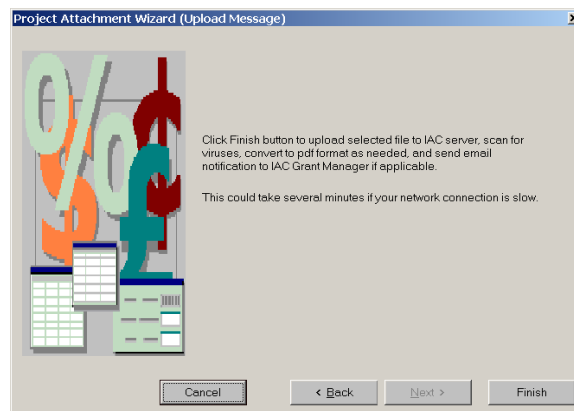



Click on all the Activities that are applicable to the attached photo. Select the Next button. This will bring up the E-Mail Comment screen.

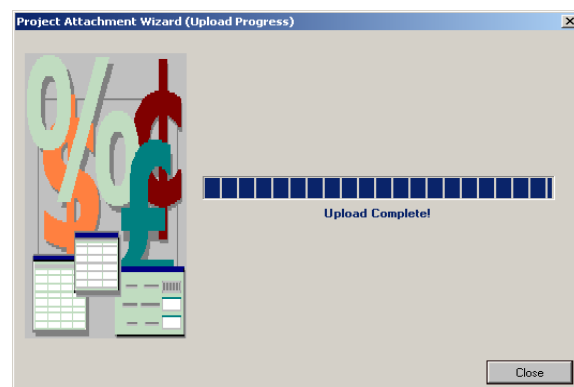
Next >



Add any information you would like to have transmitted to your Grant Manager. Select the Next  button. This will bring up the Upload Message screen.

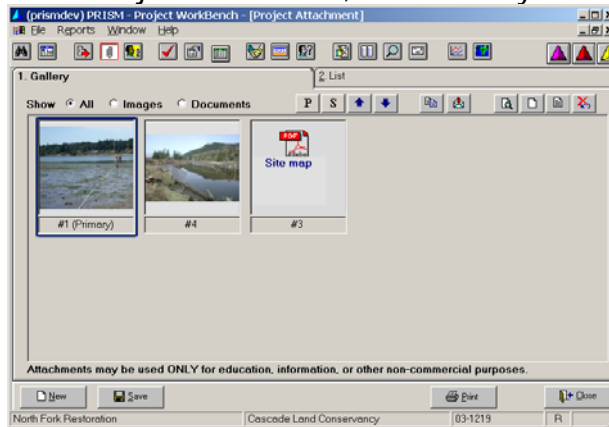


Select the Finish  button. This will bring up the Upload Progress screen.



Be patient. You are sending a photo over the Internet and it can be slow. If you find this process is too slow for your connection, you can email the photo to your SRFB Grant Manager. When the upload is complete, press Close and it will return you to the Gallery screen (Tab 1) which gives you an overall view of your attachments.

## Project Attachment, Tab 1 Gallery

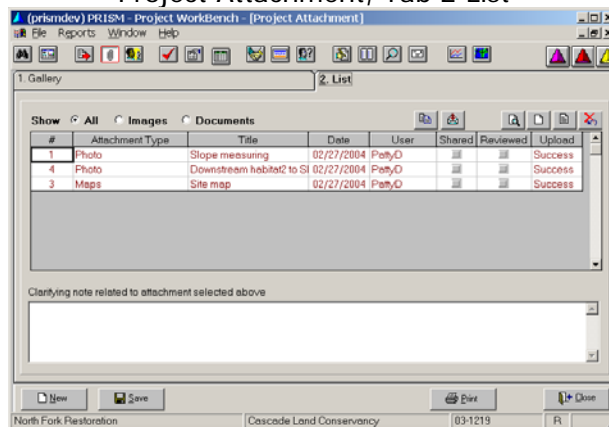


### Screen Buttons

	To copy an attachment to your clipboard, first click on the item and then the Copy button.
	To export an attachment to save on your computer, first click on the item and then the Export button. You will then be given the option of where you want to save it.
	View button gives a full screen view of selected attachment.
	Add button allows user to attach another photo or document to current project.
	When this edit button is selected, an attachment detail screen appears with one to four tab sections, depending on type of attachment. The user may make additions or changes that pertain to the selected attachment on any or all of the screens. When finished, Save and Close.

To view a summary of all the documents, photos, and graphics submitted for the project, click on Tab 2 List.

## Project Attachment, Tab 2 List




To view all attachments, make sure the "All" button is selected. The "Shared" button is marked after a SRFB Grant Manager has reviewed the document and made it available to all PRISM users. Until it is marked, the document/photo/graphic can only be viewed by SRFB staff and the organization and lead entity submitting the application. This screen will also tell the user if there were any problems with the uploading process. The only data that can be entered on this screen is in the Clarifying note section.



## XI. Using the Project Checklist

Once an application has been submitted to the SRFB staff for review, the Grant Manager will start completing an on-line checklist. This checklist contains information about required elements of an application.

Click on the project and then select the Checklist  icon from the top menu.




An applicant cannot change any data on this screen, however it is a great tool for an applicant to see a Grant Manager's notes regarding an applicant's completeness. Applicants may, from time to time, receive letters and a checklist detailing the information contained on the screen.

Checklist (default view)

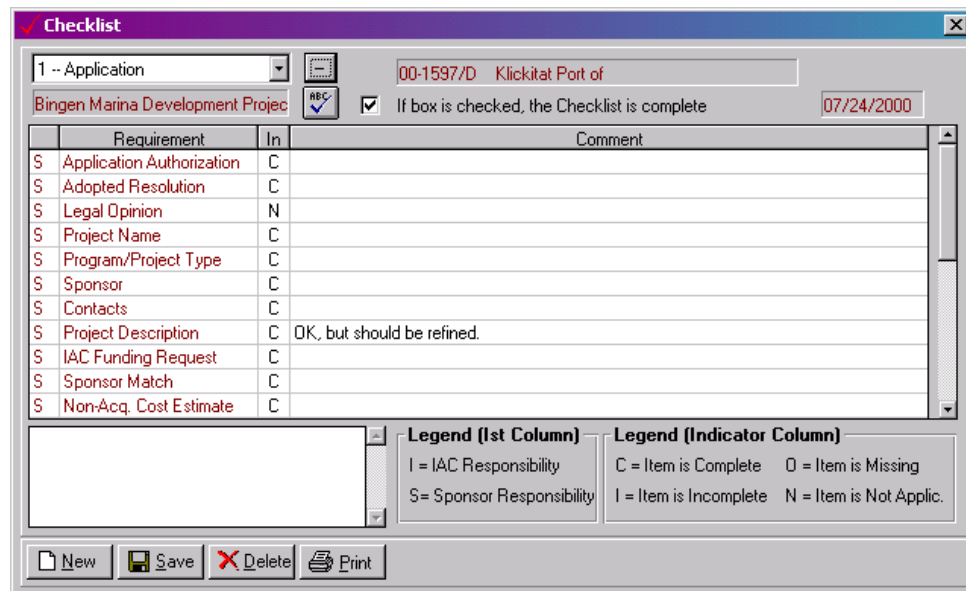
	Requirement	In
S	Application Authorization	C
S	Project Name	C
S	Funding Program	C
S	Project Type	C
S	Applicant Information	C
S	Contact Information	C
S	Project Description	C
S	IAC Funding Request	C
S	Match	C
S	Non-Acq. Cost Estimate	C
S	Application Questionnaire	C

The codes are: C = Item is complete; O = Item is missing; I = Item submitted is incomplete; N = Item is not applicable for this application.

The checklist items are different for each grant program and different type of project (acquisition, development, restoration, etc).

To expand the screen to see all the text, select the  button.

Checklist (expanded view)






	Requirement	In	Comment
S	Application Authorization	C	
S	Adopted Resolution	C	
S	Legal Opinion	N	
S	Project Name	C	
S	Program/Project Type	C	
S	Sponsor	C	
S	Contacts	C	
S	Project Description	C	OK, but should be refined.
S	IAC Funding Request	C	
S	Sponsor Match	C	
S	Non-Acq. Cost Estimate	C	

**Legend (1st Column)**  
I = IAC Responsibility  
S = Sponsor Responsibility


**Legend (Indicator Column)**  
C = Item is Complete   O = Item is Missing  
I = Item is Incomplete   N = Item is Not Applicable.

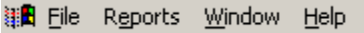
New Save Delete Print

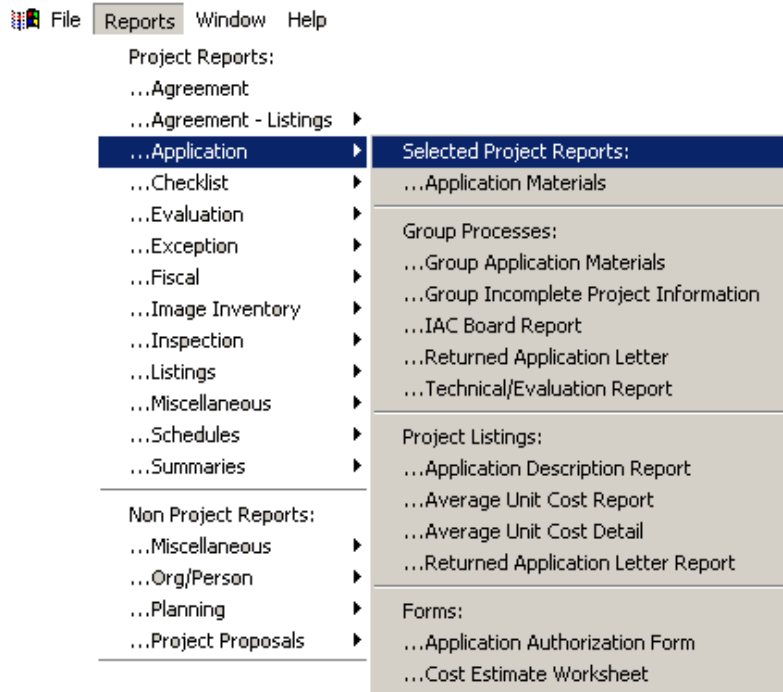
To make the screen smaller again, select the  button.

The  box is marked when all the data for the application has been completed. Once done, select the Close  button located in the right top corner.

## XII. Reports

There are a number of reports that will be of benefit to the applicant. Reports can be accessed directly from many screens (Print  button) or from the Menu

 bar. The Reports Menu brings up a list of reports that can be generated from the system.



Select  for the following reports:

### ■ Application Authorization Form

The Application Authorization Form is available as a report to be used by sponsors. For applicants with an on-line connection, the Application Authorization Form is printed, listing the applicant's projects and only requiring a signature.

### ■ Application Materials

Application Materials is a menu selection consisting of 10 separate reports. These reports make up the primary application reports and are grouped together on the reports menu under Application Materials.

### ■ Application Project Summary

Application Project Summary contains key information about an application. It extracts data from Application Data module, as well as information from the organization/person screens. The Application Project Summary (and the cost estimate report) is the basis for project review, technical review, evaluation, and Board review.

### ■ **Non-Acquisition Cost Estimate**

Non-Acquisition Cost Estimate reports on cost estimate information for development and non-capital projects. It pulls information from the Application Data, Tab 5 Non-acquisition Information screen.

### ■ **Acquisition Cost Summary**

The Acquisition Cost Summary summarizes cost estimates for acquisition projects. It pulls information from the Application Data, Tab 4 Acquisition Information screen.

### ■ **Acquisition Cost Details**

The Acquisition Cost Detail is a detail report by parcel on cost estimates for acquisition projects. It pulls information from the Application Data, Tab 4 Acquisition Information screen. Typically, this report accompanies the Acquisition Cost Summary report.

### ■ **Description and Funding Information**

Description and Funding Information reports the application description and summary cost estimates. It pulls information from Application Data, Tab 3 Funding Request and summary information from the Application Data, Tab 4 & 5, Cost Estimates screens.

### ■ **Applicant Information**

Applicant Information reports on organizations and contacts for a project. It pulls information from the Organization, Tab 1 and Person, Tab 5 screens.

### ■ **Project Worksite Information**

Project Worksite Information reports on worksite data. It pulls information from the Application Data, Tab 9 Location Information, including the pop-up Map, Area, and Water screens.

### ■ **Miscellaneous Information**

Miscellaneous Information reports permits and special program information for FARR, NOVA/NRTP, and Salmon. It pulls information from the Application Data, Tab 10 Permits and the Application Data, Tab 11 FARR, NRTP/NOVA and Salmon Information screens. Depending on the program, different information will print on the report.

### ■ **Application Questionnaire**

Application Questionnaire reports the answers provided to the application questionnaire. It pulls information from the Application Data, Tab 8 Questionnaire screen.

Select  for the following reports:

### ■ **Browser Report**

The Browser Report is useful to Grant Managers for the management of application workloads. The Browser Report can be sorted and organized in the same way as the Browser. These customized reports become useful in creating lists of projects in the application statuses.

- **Project Funding/Listing by Location**

A listing of projects by location either with or without associated funding information.

- **Project Funding by Program**

A listing of projects by program either with or without associated funding information.

- **Salmon/Listing by Element; Lead Entity; Habitat Factor; Targeted Species**

A variety of listing reports either with or without financial information for salmon related projects.

## XII. Quick Steps

Following is a condensed version of instructions for Entering an Application for those who just need a review.

On the PRISM browser screen, select the New Application button.

1. **Tab 1 Basic Data.** Type in Project Name. Select Funding Program (Salmon State Projects) and Project Type. Use the Find button to locate the Project Sponsor and designate as Primary, and the Contact Person and designate as Project Manager. If a sponsor and/or contact person cannot be found, you will need to enter a new one by selecting the Add button.
2. **Tab 2 Description.** Select an IAC Goal and Objective from the lists provided. Type in a Project Description.
3. **Tab 3 Funding.** Enter amount of funds requested. Under Sponsor Match select the type of match your organization will provide and the amount for each type of match.
4. **Tab 4 Acquisition Info.** Select Add New Property button and enter data on Property Details screen. Save. On the summary screen, enter Administration Cost.
5. **Tab 5 Non-Acquisition Info.** Select Elements and Items from dropdown lists and enter Quantity and Total Cost amounts. For some items, a short description is required. Enter the Sales Tax and A&E Cost Estimate if the field is not grayed out.
6. **Tab 6 Measurements.** Enter numerical data in the Proposed Quantity field and any additional information in the Notes section.
7. **Tab 8 Questionnaire.** Click on each question and type response in text box provided.
8. **Tab 9 Location.** Enter driving directions and current landowner information.
9. **Tab 10 Permits.** Select permits needed from dropdown box. Add pertinent permit information in text box.
10. **Tab 11 Salmon Information.** Select Targeted Species and Habitat Factors Addressed from dropdown box and identify Primary for each. Enter Source information in text fields.
11. Select **SAVE**, **SUBMIT**, and **YES** to release application to IAC. If any errors are detected, you will receive an Incomplete Project Information message. Select YES to view a detailed report of missing and/or incorrect information. Fix errors and repeat **SAVE** and **SUBMIT** until application passes all edits.
12. Add Attachments (see Section X for step-by-step instructions of this new feature).